

NC COVID-19 RESPONSE: Provider Enrollment Process

This guide provides an overview on how to enroll as a North Carolina vaccine provider in the state's COVID-19 Vaccine Management System (CVMS).

What is the COVID-19 Vaccine Management System (CVMS)?

CVMS is a secure, cloud-based system that enables vaccine management and data sharing across recipients, care providers, hospitals, agencies, and local, state, and federal governments on one common platform. Through CVMS, North Carolina health care providers are able to:

- Enroll in the COVID-19 Vaccine Program
- Manage COVID-19 vaccine inventory
- Track COVID-19 vaccine administration
- Invite their employees to register for vaccination
- Schedule appointments

Before getting started in CVMS, someone from your organization should:

- Attend a live CVMS Provider Enrollment Training Session ([CVMS Training Schedule](#))
- Review and complete the [COVID-19 Vaccine Readiness Checklist](#) before step 4 below
- Identify a single point of contact to answer employee questions and collect any feedback to share with NCDHHS COVID-19 Vaccine ([Knowledge Base](#))

* Enrollment can be initiated at <https://covid-enroll.ncdhhs.gov>

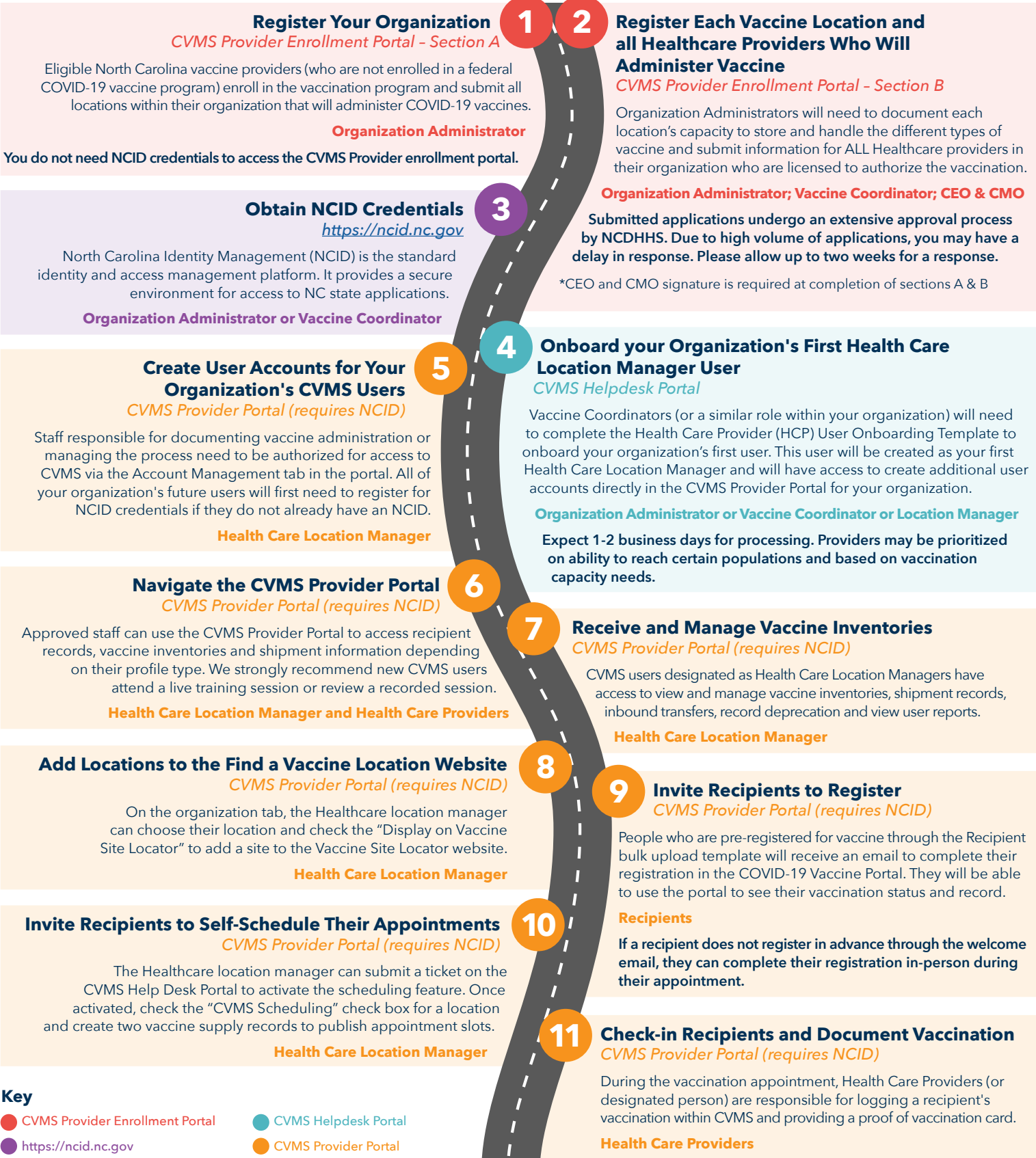
CVMS Enrollment and Onboarding Process

Health Care Provider (HCP): Person who conducts recipient check-in and registration as well as vaccine administration and scheduling first and second dose appointments (for locations that have signed up for the scheduling feature in CVMS).

Health Care Location Manager: The Health Care Location Manager is able to do everything that the Health Care Provider can. Additionally, they manage the location's vaccine inventory, can bulk upload recipients, are able to publish location details on Find a Vaccine Location ([MySpot.nc.gov](#)), and manage appointment schedule settings (for locations that have signed up for the scheduling feature in CVMS).

Vaccine Coordinator (Primary & Back-up): The primary is the person responsible for completing Section B in the provider enrollment process in the COVID-19 Vaccine Management System (CVMS) Provider Enrollment Portal. The back-up is the second point of contact after the Primary Vaccine Coordinator for a specific location.

Organization Administrator: Person responsible for initiating the provider enrollment process for an organization and completing Section A in the COVID-19 Vaccine Management System (CVMS) Provider Enrollment Portal.



Step-by-Step Instructions for CVMS Enrollment

STEP 1: Register Your Organization

Organization Administrators can submit an enrollment application for the CVMS Provider Enrollment Portal by initiating self-registration directly at <https://covid-enroll.ncdhhs.gov>

Complete the information for the Organization Administrator (Section A) in the CVMS Provider Enrollment Portal. You will be asked to provide:

- Organization details
- Name of the Organization Administrator and contact information
- All location(s) that will administer vaccinations and the onsite Vaccine Coordinator contact information
- Names of Executive Officers (CEO and CMO) and contact information

Once all required fields are completed for Section A (Step 1), confirm the information is correct and hit submit. You will then be able to go to Section B, Vaccine Coordinator (Step 2).

HELPFUL LINKS: [CVMS Provider Enrollment Account Registration and Password Reset User Guide](#)
[CVMS Provider Enrollment Organization Administrator User Guide](#)

STEP 2: Register Each Vaccine Location and All Prescribing Providers Who Will Administer Vaccine

After you complete (Section A) Step 1, the Vaccine Coordinator will receive an email to register for the CVMS Provider Enrollment Portal and complete Section B for their assigned location(s). To complete this section you will be asked for:

- Location address and contact information
- Names of a primary and a back-up Vaccine Coordinator and contact information
- Shipment availability
- Provider type and setting
- Population(s) served
- Storage capacity and storage unit specifications
- List of providers who will administer vaccines, including license numbers with prescriptive authority *
- Initial healthcare location manager (optional in this step)**

*For locations with 25 or more practicing providers who will administer the COVID-19 vaccines, you can receive support entering providers into CVMS via the provider bulk upload process:

- Please use the [Provider Bulk Upload Template](#) and submit a ticket via the [CVMS helpdesk portal](#)
- If your location needs assistance with bulk upload, please submit Section B WITHOUT adding providers in CVMS

**If you choose not to add the initial healthcare location manager during this time, you will need to complete and submit the HCP User Onboarding template to the CVMS Helpdesk Portal (Step 4). We recommend Healthcare Location Managers needing to upload a large number of users continue to use the HCP User Onboarding template to save time.

Once all required fields are completed for Section B (Step 2), the Vaccine Coordinator must:

- Review and sign the Storage and Handling Attestation
- Review and sign the CDC COVID-19 Vaccination Program Provider Agreement

Upon completion of Section B, the organization's CEO and CMO will receive a welcome email to register and access the CVMS Provider Enrollment Portal to:

- Review the submitted organization information
- Approve submitted organization information via e-signature
- Review and sign the Storage and Handling Attestation
- Review and sign the CDC COVID-19 Vaccination Program Provider Agreement

The CEO and CMO signatures are required at completion of sections A and B.

Note: If necessary, you have the option to resubmit your Section B as well as review all the information you are submitting one more time. Once you reach the final page of Section B, select your reasons for resubmitting and select Resubmit.

Submitted applications undergo an extensive approval process by NCDHHS. You will be notified if your file has been approved, denied or requires additional information.

Due to high volume of applications, there may be a delay in response. Please allow up to two weeks for a response.

HELPFUL LINKS: [CVMS Provider Enrollment Vaccine Coordinator User Guide](#)
[CVMS Provider Enrollment Responsible Officer User Guide](#)
[CVMS Provider Enrollment Portal Complete Storage and Handling Attestation Job Aid](#)
[CVMS Provider Enrollment Portal Account Maintenance User Guide](#)

STEP 3: Obtain NCID Credentials

All health care providers and employees who will use CVMS to manage vaccine distribution must register for NCID credentials.

If you do not have a Business NCID, go to <https://NCID.NC.GOV>. Complete the following steps to obtain your credentials:

- Click register
- Select Business
- Choose a username
- Confirm email address by clicking link in the automated verification email
- Complete all required fields
- Set up security questions
- Finish and submit

Email your NCID username to your assigned Vaccine Coordinator or Organization Administrator who will grant you access to the CVMS Provider Portal. Please note there is a 24-hour approval process.

IMPORTANT: If you are employed or responsible for two or more locations for your organization, you only need to create a single NCID login to access each location.

HELPFUL LINKS: [NCID Registration Link](#)

STEP 4: Onboard your Organization's First Health Care Location Manager User (for those who did not do so in Step 2) and bulk upload users (OPTIONAL)

NOTE: This step is only applicable for those who did not input the initial Health Care Location Manager during provider enrollment (Step 2) and/or those who wish to bulk upload HCP users to the CVMS Provider Portal.

Vaccine Coordinators (or similar roles within your organization) will need to complete the Health Care Provider (HCP) User Onboarding Template to onboard your organization’s first user (for each location). This user will be created as your first Health Care Location Manager and will have access to create additional user accounts directly in the CVMS Provider Portal for your organization.

To begin, download the [HCP User Onboarding Template](#) (This can also be opened from the CVMS Readiness Checklist).

Save and rename the file according to the following naming convention: [Insert Name of Organization] HCP [Insert Date - MM-DD-YYYY].xlsx

Instructions for filling out the HCP User Onboarding Template:

1. Complete Vaccine Coordinator Information. If there are issues or errors with the HCP User Onboarding Template, a member of the NCDHHS COVID-19 Vaccine Program Team will contact you. The preparer of the file will need to enter their contact information:
 - Organization name
 - Vaccine Coordinator First name and Last name
 - Role/Title
 - Email address
 - Phone number
2. Add First Health Care Location Manager Data to HCP User Onboarding Template.
 - First name and last name
 - Email address
 - NCID username
 - Profile (“Health Care Location Manager”)
 - Location information

The Health Care Location Manager can be associated with multiple locations. You will need to create a new line in the template for each location. Duplicate the same user details in the first five columns for all locations using the same location manager.

Ensure that the first name, last name, and email address for the Health Care Location Manager matches the information used to register for an NCID. Any discrepancies will delay the user from receiving access to CVMS.

3. Verify Data Entered and Save File. Review all required HCP User Data and save the file.
4. Submit the HCP User Onboarding Template.
 - Visit the [CVMS Helpdesk Portal](#) and login with your account
 - Click on the “HCP User Onboarding Template / Recipient Bulk Upload” tile to create a ticket
 - Submit a case via the intake form and attach your .xlsx file(s)
 - Your ticket will be automatically routed for processing

Please expect up to two business days for NCDHHS to process your file. If file errors are identified when NCDHHS processes your template, you will receive an email from the IT Service Desk (ncgov@servicenowservices.com).

Once your First Location Manager has been granted system access to the CVMS Provider Portal, they will receive an email with instructions on how to complete account set-up.

HELPFUL LINKS: [HCP User Onboarding Template](#)
[HCP User Onboarding Process User Guide](#)

STEP 5: Create User Accounts for Your Organization's CVMS Users

The first Health Care Location Manager created in Step 2 or Step 4 can create additional user accounts. Log into the CVMS Provider Portal using your NCID username and password. Navigate to the Account Management tab on the homepage and click add “new member.” Enter the required fields for each new user, including:

- First name and last name
- Email address
- NCID username
- Profile (Drop-down field, select either “Health Care Provider” or “Health Care Location Manager”). Health Care Providers administer the vaccine and check in recipients. Health Care Location Managers are responsible for supervising vaccine inventories and uploading recipients for access to CVMS Recipient Portal

Each location must be assigned a Health Care Location Manager. A Location Manager can be the same user for multiple locations.

Ensure that the first name, last name and email address for the new user matches the information used to register their NCID. Any discrepancies will delay the user from receiving access to CVMS.

After clicking save, an email will be sent to the users inviting them to sign in to their CVMS Provider Portal accounts.

HELPFUL LINKS: [CVMS Provider Portal - HCP Read Only Profile Job Aid](#)
[CVMS Provider Portal User Account Management User Guide](#)

STEP 6: Navigate the CVMS Provider Portal

Approved users will receive a welcome email from the CVMS Provider Portal inviting them to log-in.

On the CVMS Provider Portal log-in page, click the blue NCID button.

Enter your NCID username and password to sign-in.

The Health Care Location Manager and Health Care Provider profiles have different access in the CVMS Provider Portal:

Health Care Location Managers tabs:

- Home
- Recipient
- Appointments
- Bulk Registration
- Vaccine Inventory
- Vaccine Marketplace
- Shipments
- More
 - Organization Management
 - Help & Information
 - Reports
 - Account Management
 - Files

Health /Care Providers tabs:

- Home
- Recipients
- Appointments
- Help & Information

For users with access to multiple locations, you will need to select a location at each login. To change locations, use the ‘Switch Locations’ button and select another location.

Note: There are three reports currently available for Health Care Location Managers:

- 1.HCP Health Care Roles Report - Lists all users and their roles at the location of the logged-in user.
- 2.Inventory Summary Report - Provides COVID-19 vaccine inventory at your location.
- 3.Recipient Vaccination Report - Lists everyone who has a received a vaccination at your location.

HELPFUL LINKS: [CVMS Provider Portal](#)

[CVMS Provider Portal 101](#)

[CVMS Provider Portal Reports User Guide](#)

[CVMS Provider Portal Log in and Getting Started User Guide](#)

STEP 7: Receive and Manage Vaccine Inventories

Users designated as a “Health Care Location Manager” in the CVMS Provider Portal can receive and process COVID-19 vaccine inventories in the system.

If you are responsible for multiple locations for your organization, you will be able to switch locations within the CVMS Provider Portal to view and manage vaccine inventories for each location.

CDC COVID-19 vaccine guidelines require that you maintain accurate inventory levels for each location you support.

Once the manufacturer starts the shipping process each week, a vaccine shipment record will be created under the shipments tab.

- At the top of your home page, locate the Shipments tab
- Click Shipments
- After clicking Shipments, you will be directed to the Shipments page

You will also receive an email notification when a vaccine shipment is on its way to your location.

By default, you will see a list view on your page of your recently viewed records. To see all your Shipment Records, you will have to switch to the All Shipment Records list view. You will be able to switch back and forth between list views.

The Shipment record includes details about your expected order such as date shipped, quantity shipped, tracking information, vaccine lot number, NDC number, expiration date, and the manufacturer name.

Primary Vaccine Coordinators will be notified via email from Pfizer, McKesson (Moderna), Johnson & Johnson (Janssen) if a vaccine shipment has been processed for location(s) they support.

Please reference the user guides in the Links section, for detailed instructions on how to complete the following actions relating to vaccine inventories:

Adding COVID-19 Vaccine Inventory - When you physically receive a COVID-19 vaccine inventory shipment, you need to add the inventory to your location’s COVID-19 vaccine inventory in CVMS. Processing your COVID-19 vaccine shipments correctly will ensure accurate COVID-19 vaccine inventory reporting to the state.

Receiving an Inbound Vaccine Transfer - If you are receiving an inbound transfer from another location, review the inbound transfer page for status updates. When you receive the inbound transfer, process the inventory via the inbound transfer page in CVMS.

Updating Vaccine Records - You will be able to update the vaccine inventory record. It is very important to ensure accurate data entry when processing a new COVID-19 vaccine inventory shipment.

Redistribution - The planned and scheduled movement of inventory between two enrolled sites within the same organization with an approved redistribution agreement.

Transfer - The unplanned and unscheduled movement of inventory between two enrolled sites (move inventory between those who have vaccine to those who do not).

Confirm Expiration Dates for COVID-19 Vaccines - When a Health Care Location Manager at a location receives a COVID-19 vaccine order from the manufacturer, they should confirm the expiration date for the vaccine lot is entered correctly in the CVMS Provider Portal.

Documenting Insufficient Quantities - Process for reporting any time when less than the CDC standard doses are extracted or obtained from a vial of a specific vaccine manufacturer. Insufficient quantities can be documented for any COVID-19 Vaccine Product.

Vaccine Marketplace - If you have a surplus of COVID-19 vaccine doses or if you need additional COVID-19 vaccine doses, use the Vaccine Marketplace to directly coordinate with another provider and agree to transfer COVID-19 vaccine doses.

- HELPFUL LINKS: [CVMS Provider Portal Accounting for Extra Doses in the Vaccine Inventory Job Aid](#)
- [CVMS Provider Portal Offer Vaccine Through Vaccine Marketplace Job Aid](#)
- [CVMS Provider Portal Request Vaccine Through Vaccine Marketplace Job Aid](#)
- [CVMS Provider Portal Reports User Guide](#)
- [CVMS Provider Portal Documenting Insufficient Quantities](#)
- [CVMS Provider Portal Inventory Marketplace, Deprecation, Transfer, and Redistribution User Guide](#)
- [Receiving and Processing Vaccine Shipments User Guide](#)
- [CVMS Provider Portal State Sponsored Contract Vaccine Inventory Job Aid](#)
- [CVMS Provider Portal Federal Allocations Job Aid](#)
- [North Carolina Department of Health and Human Services COVID-19 Vaccine Expiration Date Job Aid](#)

STEP 8: Add Locations to the Find a Vaccine Location Website

Display your vaccination sites on the CDC’s Vaccine Site Locator website - [vaccines.gov](#) - The Health Care Location Manager will log in to the CVMS Provider Portal using their NCID username and password.

Navigate to the Locations tab and click on the location name you wish to add to the Vaccine Site Locator website.

Enter your vaccination location information and then select “Yes” under “Display on Vaccine Site Locator” to add your site to the CDC’s Vaccine Site Locator website if your location provides COVID-19 vaccines to the general public. Click SAVE once you are ready to publish the location.

- HELPFUL LINKS: [CVMS Provider Portal Display on Vaccine Site Locator User Guide](#)
- [CVMS Provider Portal Display a New Community Vaccination Event Location on the Vaccine Site Locator Website Job Aid](#)
- [CVMS Display on Vaccine Site Locator One Pager](#)

STEP 9: Invite Recipients to Register in the CVMS

If you have a large number of vaccine recipients that need to register in the CVMS, use the Recipient Bulk Upload Template to add them. It is helpful to have recipients register in the CVMS prior to their appointment because it significantly cuts down the check-in process for Healthcare Providers on the day of the appointment.

- Complete the Recipient Bulk Upload Template by entering the following information in the template:
- Employee/Recipient First Name
 - Employee/Recipient Last Name
 - Employee/Recipient Email Address

Submitting the Recipient Bulk Upload Template:
Upload the completed Recipient Bulk Upload File by navigating to the Bulk Registration tab in the CVMS Provider Portal.

View uploaded recipient records for completeness and accuracy. If you find errors or missing information, click cancel to remove the file and edit.

If the data is correct, click Create Records.

Once upload is complete, you will receive an alert message stating the number of successful recipient uploads and the number of failed.

Once you click OK, the recipients who were successfully uploaded will receive an email with instructions on how to complete their account setup and register in the COVID-19 Vaccine Portal.

If there were errors in the recipients’ information that caused a failure in uploading, you will receive an email with the attachment that contains the failed records and the reason for failure.

Correct the errors in the same file based on the failure reason and re-upload the file in the Bulk Registration tab.

Recipients without an email address can be registered on-site in the CVMS and receive the vaccine.

- HELPFUL LINKS: [Recipient Bulk Upload User Guide](#)
- [Recipient Bulk Upload Template](#)

STEP 10: Invite Recipients to Self-Schedule Their Appointments (OPTIONAL)

Activating the scheduling feature - Log in the CVMS Help Desk Portal, select vaccine providers and submit a ticket requesting to activate the scheduling feature for your location(s).

Enable the scheduling feature for your location - Once the scheduling feature is activated, navigate to the Locations tab in the Provider Portal and click on the location name you want to enable scheduling for. You will then be able to view and edit your location record.

Click the Edit button in the top left corner and then check the "CVMS Scheduling" check box and click save.

Create your two vaccine (appointment) supply records for first and second dose appointments - The first time you use the scheduling feature for a location, you'll need to create two vaccine (appointment) supply records. To learn how to create the two initial vaccine supply records, please reference the CVMS Provider Portal Manage Appointment Scheduling User Guide.

Set your schedule - Click the availability tab and enter the:

- Time window duration - how long it takes for a vaccine administration, generally around 10 to 15 minutes
- Start and closing dates - recipients will be able to select an appointment slot scheduled between these dates
- Available date - the date that future appointments become available for scheduling on the Find a Vaccine Location website to allow recipients to book in advance
- Days and hours of operation
- Number of appointments per time window - how many people can be vaccinated at the same time

Publish your appointments - Click the Related button, open the Dose 1 Vaccine Supply Record and in the Current Stock section add the number of appointment slots you wish to release. Make sure this adds up to the current vaccine stock. Do not update the Date of Stock Count.

HELPFUL LINKS: [CVMS Provider Portal Manage Appointment Scheduling User Guide](#)
[How to Use Scheduling in CVMS](#)

STEP 11: Check-In Recipients and Document Vaccination

1a) Search for a recipient in CVMS Provider Portal.
If a recipient is already registered in the CVMS you will be able to locate their record and view their information, including their Priority Tier, Eligibility Status and Vaccine Dose Status.

If errors were flagged on the registered recipient's Registration Form or it is incomplete, correct the information with the recipient's help. (Note: Only a Health Care Location Manager profile can update a recipient's registration data.)

NOTE 1: If you encounter one of the following scenarios while searching for a recipient in CVMS, proceed to step 1b to complete the point of care registration.

- Recipient was not located in the system
- Recipient was invited, but has not completed registration
- Recipient received their first dose vaccination at a Long-term Care Facility and was not logged or registered in the CVMS

NOTE 2: If your location is using the scheduling feature in the CVMS, there are three methods to check in a recipient:

- Method 1: Under today's appointment, click on the recipient's name to begin vaccine administration.
- Method 2: Enter the appointment confirmation number under the Recipient Check In tool and click Go.
- Method 3: On the Appointments tab, identify the correct appointment booking for the recipient and click on the drop-down arrow to the right of their name to select Check in.

1b) Point of care process for unregistered recipients
Assign staff to help with recipient onsite registration. They will need to create a recipient record within the CVMS Provider Portal for any unregistered recipients. On the Recipient tab, click Create New Recipient and enter in the recipient's personal information including their email address if they have one.

For recipients with a mobile phone and email address:

- Once personal information has been submitted in the CVMS Provider Portal, the recipient will receive an email inviting them to complete their registration via the mobile friendly CVMS Provider Portal.

For recipients who do not have access to a mobile phone or an email address:

- Go to the Help & Information tab and download the COVID-19 Registration Form
- Print the document and have the recipient physically complete. A staff person will then need to carefully enter the information from the form into the CVMS Provider Portal.
- Complete this process with the recipient present. If something is entered incorrectly, you will need to have a Health Care Location Manager update the recipient's registration information, or have the recipient make the change via the COVID-19 Vaccine Portal (formerly CVMS Recipient Portal).

2) Confirm recipient identity and vaccine eligibility
Confirm registered recipient is eligible to receive the vaccine by validating their priority and eligibility status as listed in CVMS. As of April 7, all adults 16 and older are eligible to receive a COVID-19 vaccine in North Carolina. The Pfizer vaccine is approved for people age 16 and older, while the Moderna and Johnson & Johnson vaccines are approved for adults 18 and older.

NOTE: The HCP can use discretion to administer a COVID-19 vaccine to a recipient with a "Not Approved" eligibility status.

The HCP can determine if a recipient falls under a group currently eligible for vaccination (in accordance with the CDC and NCDHHS prioritization of COVID-19 vaccine recipients).

The state of North Carolina does not require proof of identity, photo ID, Social Security Number or proof of insurance to proceed with vaccination. U.S. citizenship is not required.

3) HCP locates recipient record and receives verbal consent
The HCP searches for the recipient in the CVMS Provider Portal by their name, date of birth or email address. The HCP reads vaccine health disclaimers to the recipient who will need to give verbal consent to receive a COVID-19 vaccination. The HCP records that they have received the recipient's verbal consent in the CVMS.

4) HCP administers COVID-19 vaccine

The HCP administers the vaccine and captures details in the CVMS:

- Injection site
- Dose (first or second)
- Route - intramuscular (IM) or subcutaneous (SQ)
- Date and time of dose
- Vial barcode
- Vaccine product
- Recipient notes (if applicable)
- On behalf of clinician statement, if applicable

Please review information for accuracy before submitting.

5) Schedule the second dose appointment

Share when the recipient will need to get a second dose, if applicable, and schedule the second dose appointment and share it with the recipient.

NOTE: If your location is using the scheduling feature in CVMS, you can:

- Navigate to the Vaccine Administration summary page, click on “Book Second Dose”
- Or navigate to the Appointment tab, search for the recipient, and click on the toggle at the end of the row and select “Schedule Second Dose”

From there:

- Select a date and a time
- Click on Complete Appointment
- The recipient will be notified by email or by text message if they selected to receive notifications this way for the first dose appointment

6) HCP reviews post-vaccine reminders with recipient

At the end of the appointment, the HCP will:

- Print and provide the CDC COVID-19 Vaccination Record from the CVMS
- Review v-safe information
- Share timing requirements for second dose
- Schedule second dose appointment

Recipients can view their vaccination status and re-print their vaccine card from the COVID-19 Vaccine Portal (formerly CVMS Recipient Portal) by going to My dashboard > Vaccine Record.

- CVMS Provider Portal Recipient Point of Care User Guide
- CVMS Provider Portal Vaccine Administration User Guide
- CVMS Provider Portal Viewing Proof of Vaccination User Guide
- Addendum for Scheduling Feature at Point of Care and Vaccine Administration User Guide

For recipients without email addresses, print out the proof of vaccination screen on the CVMS Provider Portal or assist them in taking a screenshot of the page with their phone.

CVMS automatic notifications

Recipients will receive two second dose reminder notifications:

- First reminder: 24 hours after first dose
- Second reminder: One week after first dose

Recipients will receive a physical vaccination card and can also view their vaccine information via the COVID-19 Vaccine Portal (previously the CVMS Recipient Portal).

Emails from vaccineinfo@dhhs.nc.gov: Communications will be shared regarding CVMS enhancement updates, planned outages, training event invitations and information about new user guides and video demonstrations.

HELPFUL LINKS: [CVMS Provider Portal Vaccine Administration User Guide](#)

[CVMS Provider Portal Recipient Point of Care User Guide](#)

[Addendum for Scheduling Feature at Point of Care and Vaccine Administration User Guide](#)

[CVMS Provider Portal Viewing Proof of Vaccination User Guide](#)

[Recipient Registration and COVID-19 Vaccine Administration Form \(English\)](#)

[Recipient Registration and COVID-19 Vaccine Administration Form \(Spanish\)](#)

[CVMS Provider Portal Handling COVID-19 Vaccine Administrations for Recipients that Received First Dose Through a Long-Term Care Pharmacy Partner](#)